

FLEET 2000

...ISO Professional Vehicle Maintenance System



USER'S GUIDE

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FLEET 2000

The FLEET 2000 Professional Vehicle Maintenance Management System is a full feature program that is designed to provide small and large companies with the ability to thoroughly define and monitor the maintenance function, provide preventive maintenance and efficiently manage the vehicle maintenance function. The system also provides valuable management information to analyze and evaluate the effectiveness of the various functions, including the tracking and reporting of labor, material and subcontracting costs. A full featured inventory and purchasing system is included with the maintenance program.

The FLEET 2000 Professional Vehicle Maintenance Management System is a 32 bit program designed for any version of Windows 95 Windows 98 and Windows NT. The program is network ready and is year 2000 compliant.

A unique feature of the program allows use of the full features of the program for demonstration purposes (quantity of new data entry is limited, but sufficient for the user to fully evaluate the capabilities of the program). Company data entered during the demonstration period is not lost when the system is fully activated. Activation simply involves the entry of a code by the user to indicate the purchase of selected modules.

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access each module and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

ABOUT THIS MANUAL

The FLEET 2000 manual is provided to introduce the user to the extensive capabilities and features of the FLEET 2000 modules. The manual is purposely brief and simple to follow so that the user will quickly be able to access and use the program. A detailed on line manual is provided through the Help selections at each window by pressing the "Help" button.

HARDWARE REQUIREMENTS

FLEET 2000 can be installed on IBM 386, 486, or Pentium true compatibles with at least 640K of RAM memory. For best performance a 486 or Pentium computer running at a minimum of 33 MHz should be used. FLEET 2000 needs most of the 640K of RAM so other memory resident (TSR's) software should be held to a minimum. The complete program requires up to 12 megabytes of hard disk space for all the options. More disk space will be required as data is added. The program is fully network ready and will run on Windows 95, Windows 98 or Windows NT.

INSTALLATION

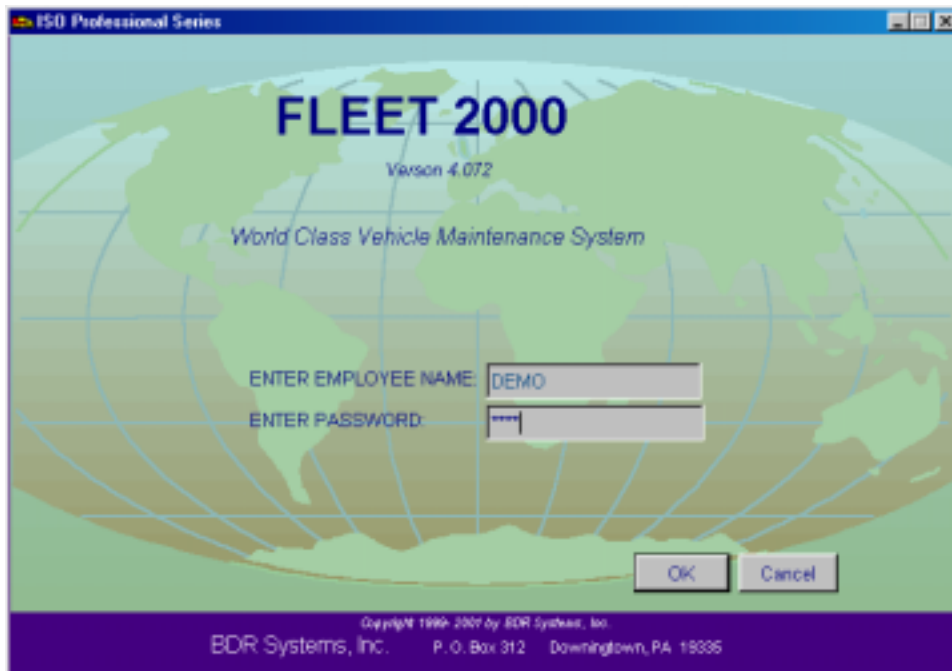
FLEET 2000 is supplied on a CD with all the programs and the User's Guide. The disk will self start when inserted in the drive (or select the CD drive and then Install.exe from explorer). Select the Vehicle/Fleet Maintenance button, then the Install FLEET 2000 button.

The installation program will create new directories automatically in the drive and directory name the user specifies when prompted. The default directory is C:\FLEET

To install on a network server map the FLEET folder to a DOS drive (such as J:/FLEET. Then create shortcuts on each workstation with the target J:/FLEET/FLEET.exe.

STARTING PROGRAM

During the installation process a program group named FLEET 2000 was created. To start FLEET 2000 double click on the FLEET 2000 icon, or select from the program list in Windows. The program may also be started by double clicking on C:\FLEET\FLEET.EXE (or the directory name specified by the user in the installation process) in either windows File Manager or Explorer. The FLEET 2000 title and main menu will be displayed.



SECURITY

A security system is incorporated in FLEET 2000 to provide limited access of the individual programs and data so that only duly authorized personnel can view or change data. Each employee of the company is identified by name and each is issued a unique password. In addition, the modules that the employee is permitted access are designated. Five levels of security are provided to limit the activity of the employee in that module.

- Level 1- System Administrator
 - Enters security passwords
- Level 2- Personnel
 - Access to employee records and labor rates
- Level 3- Manager
 - Access to all other records, data and management reports
- Level 4- Operator
 - Access to all other records and data.
- Level 5- Review
 - Can only view summary records, cannot change data.

Only employees with security Level 1 have access to the security portion of the system. To access the security setting, select "SUPPORT" from the main menu of the FLEET 2000. Then select "EMPLOYEES".

The employee designated as the system administrator (by setting the security level for that employee to

1) should enter the security level and password for each employee. **Note that only the employee(s) with Level 1 security will have access to this screen. Be sure the at least one employee has the Level 1 designation before deleting the "DEMO" employee from the employee list.** The FLEET 2000 system is shipped with an employee named "DEMO" with the password "DEMO" and security level 1 so there is initial access to the security screen.

PROGRAM STRUCTURE

HELP SCREENS

Each of the modules is supported by extensive on line help that is accessible at every window. Help may be accessed from either the help contents selection from window menus or by selecting the "Help" button on each window.

SAMPLE DATA

FLEET 2000 is supplied with sample data simulating a automotive business. The data is automatically provided during the installation process. It is strongly recommended that this data be left on the system until the user becomes thoroughly familiar with all the features of the program. While becoming familiar with the program this sample data may be modified, or additional data may be entered. For each new window it is suggested the user read the help associated with the window. Follow the instructions for adding, modifying or deleting data and records.

After becoming familiar with the features of FLEET 2000 the sample data may be removed individually from the appropriate windows using the delete method provided for that window.

STRUCTURE

The FLEET 2000 modules are designed to be extremely simple to use and to provide the maximum amount of information using very few windows. For example the "Maintenance" and then the "Vehicle / Asset" selection of the menu will immediately provide the user with detailed data about the vehicle that is selected as well as the maintenance history about the selected vehicle-items without changing windows! Buttons are provided so that complete detailed data about either the vehicle itself or the maintenance records can be easily retrieved.

All programs are constructed using several basic window types: Menus, Scrolling Tables, Data Entry windows, and Reports

Menus: Selection of area of interest.

Scrolling Tables: a list of available records.

Data Entry window: Individual detail data about a selected record.

Reports: Print out of information.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data. When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

Tables:

[PgDn] scrolls the table to the next page of data.

[PgUp] scrolls the data to the previous page of data.

[Ctrl-PgDn] scrolls the table to the last page of data.

[Ctrl-PgUp] scrolls the table to the first page of data.

Forms:

[Tab] accepts the data entry for the highlighted field and advances the highlighted cursor to the next field. When the last field is accepted all the data is saved for the record and control returns to the table window.

Select "OK" button to accept all the data from any window.

Within a highlighted field move the cursor to the desired location using the mouse or the left and right arrow keys. Characters may be deleted with the [Delete] or [Backspace] keys.

TECHNICAL SUPPORT

Unlimited technical support for FLEET 2000 is provided for one year from the date of purchase. Before contacting technical support make use of the Help functions that are available at each FLEET 2000 window. Contact BDR Systems customer service at 610-873-8570 or e-mail at address.plant@bdrsystems.com (be

certain to type the address exactly as shown, do not use capital letters).

The FLEET 2000 Professional Vehicle Maintenance System is comprised of seven major sections: Support, Vehicle/Maintenance, Maintenance Request, Inventory, Purchasing, System and Reports. The integrated system is designed to track every vehicle and other assets that require emergency or unscheduled maintenance as well as a regular preventive maintenance. The documentation of preventive and unscheduled maintenance data is specifically designed to provide record retention and traceability to assist in achieving the requirements of ISO9000. The system also provides valuable management information to analyze and evaluate the effectiveness of the maintenance program, the cost of vehicle maintenance and repair, and the status of all assets of any period. A full featured inventory and purchasing system is included in the program.

Major features include:

- Exclusive Tire Safety Alert
- Vehicle/Asset Inventory
- Unlimited maintenance items for each asset
- Maintenance intervals by days or meter/miles.
- Maintenance Request System
- Fuel Usage and Performance
- Tire Tracking and Performance
- Purchasing order generation
- Work Order system
- Monitors PM and Unscheduled Maintenance
 - Labor Costs tracked
 - Material Costs tracked
 - Subcontracting costs tracked
- Inventory System
- Labor Scheduling
- Management Analysis

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

STARTING FLEET 2000

Select the FLEET 2000 icon or select FLEET 2000 from the program listing. To enter the program the user must enter the employee name and password. For demonstration purposes enter the employee name DEMO, press Tab, then enter the password DEMO (this must be all capital letters since the password is case sensitive). Press the OK button or enter.

An exclusive feature of FLEET 2000 is the TIRE SAFETY ALERT. The alert screen is displayed if any of the fleet vehicles has tires that are approaching the estimated tire life. The sample data has two such tires. Therefore the alert screen is displayed on program entry.

The SAFETY ALERT screen is only displayed at program entry if there are tires that are approaching their estimated life. Press the continue button to display the FLEET 2000 main menu.

The functions of the program may be accessed either with the menu selection tool bar at the top or by using the icon selection tool bar. Selecting items from the menu selection tool bar will result in a drop down sub menu from which individual features may be selected. The icon tool bar provides rapid access to the most frequently used functions of the program.

To rapidly access data on screens with tab controls and lists of data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Mfg:" below). When the desired

data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

To become familiar with the features and structure of the program the following tour of the program is recommended.

VEHICLE MAINTENANCE

Every maintenance action, whether preventive maintenance or unscheduled maintenance, begins with using the Maintenance selection from the main menu (or the Vehicle icon). A sub menu provides selection of Enter Mileage Readings, Open Maint Requests, Closed Maint Requests, Vehicle Maintenance, Procedures, PM Due, Work Order Status or Open Work Orders.

Select the Vehicle icon or select Maintenance from the main menu, then VEHICLE MAINTENANCE.

VEHICLE

The vehicle section contains all the vehicles and other assets that are included in the maintenance system. Each vehicle or asset is assigned a unique alphanumeric vehicle identification number whenever a new vehicle record is added to the maintenance system. For each vehicle an unlimited quantity of maintenance items may be entered.

FLEET 2000 is structured so that vital information regarding both vehicle detail data and maintenance data is available on a single screen.

The "VEHICLE" selection of the menu will immediately provide the user with detailed data about the vehicle that is selected as well as the maintenance history about the selected vehicle- without changing windows! Buttons are provided so that complete detailed data about either the vehicle itself or the maintenance records can be easily retrieved.

The window is divided into an upper and lower section. The upper section contains a scrolling table with a listing of each vehicle that has been entered into the system. The lower section contains a scrolling table with all the maintenance records for the vehicle that is highlighted in the upper screen. Between the upper and lower tables is additional vehicle detailed data for the vehicle that is highlighted. Use the up and down arrows, selected with the mouse, to scan through the vehicle records. Note how the maintenance records and detailed vehicle data changes for each change in highlighted vehicle.

Below the lower maintenance record scrolling table is the PM maintenance status for the highlighted maintenance item for the selected vehicle. If the item is past due for maintenance it is indicated in the lower right section of the window.

The vehicle data may be sorted and viewed by vehicle number, manufacture, or vehicle description. Place the mouse cursor on the tab above the upper table and click the left mouse button to select the preferred sort.

To the right of the vehicle table are buttons to copy, add, view detail, or delete vehicle records. Place the mouse cursor on the "Vehicle Details" button and click with the left mouse button.

VEHICLE MAINTENANCE ITEMS

One of the most powerful features of the FLEET 2000 maintenance management system is the ability to schedule and track preventive and unscheduled maintenance for multiple items for the same vehicle. Example: The company truck, one asset or vehicle, requires lubrication and oil change every 5000 miles (one item), rotate tires every 10,000 miles (2nd item), wash and clean interior every week (3rd item), state inspection every year (4th item) etc. An unlimited number of maintenance items may be associated

with one asset or vehicle.

Select the "Preventive Maint" tab to add or view the maintenance items associated with the selected vehicle. Each maintenance item is independent and may have a time period or meter/milage preventive maintenance interval. Select the appropriate tab to view the general data, financial information, nameplate specifications, Spare Parts listing, Downtime records, and Comments concerning this vehicle. All the data relative to the selected vehicle is displayed in one window!

To add a new maintenance item for the selected vehicle, select the Preventive Maint tab and click on the "Add Item" button.

Select the maintenance item description from the drop down table. To add new descriptions select the SUPPORT item from the maint menu and then select MAINTENANCE ITEMS. See Maintenance Items. Enter the estimated schedule hours to perform the new maintenance. This is used in the manpower requirements calculation for scheduling purposes.

Enter either the preventive maintenance interval in miles, or alternatively, the meter reading or days interval and the unit of measure.

Enter the maintenance trade classifications and the labor hours required to perform the work.

Enter the last maintenance date for the vehicle item. If the maintenance interval period is days, the next maintenance due date will be displayed.

If the maintenance interval selected above was mileage/meter reading, then enter the reading at the last maintenance performed, the unit of measure, the current reading and the date that the current reading was made. The next reading when the next maintenance is to be performed will be displayed.

Enter comments regarding the maintenance item. Detailed maintenance procedures for the new item may be added by selecting MAINTENANCE, then PROCEDURES from the main menu, or by selecting the Procedures icon. See Maintenance Item Procedures.

To change preventive maintenance intervals, schedule hours, or manpower requirements select "Change" from the Change VEHICLE window. To delete the maintenance item select "Delete."

MAINTENANCE WORK ORDERS

To the right of the Maintenance History table on the Vehicle window are buttons to add, view maintenance work order records, or delete vehicle maintenance records. Place the highlighted selector bar on the maintenance item work order that you want to view or change the maintenance work order record. Place the mouse cursor on the "Maint Details" button and click with the left mouse button.

Select the various Tabs to view the maintenance labor, materials and subcontracting information about the selected maintenance record.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Vehicle No:" above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

OPENING NEW WORK ORDERS

Opening a new work order in FLEET 2000 is very simple.

1. From the main menu select the VEHICLE icon or "MAINTENANCE", then VEHICLE.
2. Select "VEHICLE" from the sub menu.
3. Use the mouse to scroll through the Vehicle table to highlight the vehicle.

4. Use the mouse to select the "New Maint" button.
5. Reference information regarding the selected vehicle is displayed at the top of the window. Also, the next sequential work order number is automatically assigned and is displayed.
6. When the above window is first opened the Maintenance Type will be displayed with the PM (Preventive Maintenance) block checked and the UNSCH (Unscheduled Maintenance) block will be hidden. If the maintenance action is emergency or unscheduled, place the mouse cursor on the PM block and click the left mouse button. This will deselect the PM block and will expose the UNSCH block. Accept the selection by pressing Tab.
7. The cursor will advance automatically to the next data entry field each time a field is accepted by pressing the Tab key. Alternately, use the mouse to advance to any specific data entry field.
8. Fields with down arrow buttons will display drop down data selection tables. Use the mouse to depress the down button. Point to the desired selection from the table using the mouse cursor and accept by clicking the left mouse button.
9. Do not enter a date in the "WORK ORDER COMPLETED" field until the work is actually completed. This date entry will close the work order.
10. Maintenance labor, materials and subcontracting data may be entered by selecting the labeled tabs using the mouse. Point to the requested tab and click the left mouse button.

CLOSING A WORK ORDER

A work order is closed by entering a completion date for the maintenance activity. To close the work order select MAINTENANCE in the main menu of FLEET 2000, then VEHICLE. Highlight the desired vehicle in the upper table and select the desired work order in the lower maintenance table. Then select the "Change Maint" button.

Point to the "WORK ORDER COMPLETED" field with the mouse and enter the date that the maintenance effort was completed. Press "OK". The status of the work order will be changed from "Open" to "Closed".

PROCEDURES

The "Procedures" menu selection will result in the display of the steps and the detailed preventive maintenance procedure for selected vehicle maintenance items. Use the mouse to select the PROC icon or select "Maintenance" at the main menu and then "Procedures". At the vehicle number prompt select the "Vehicle" button.

Highlight the vehicle and maintenance item and then select the "SELECT VEHICLE" button.

The preventive maintenance procedure for the selected vehicle and maintenance item will be displayed.

To add new procedure steps point to the "Add PM Proc" button and click with the left mouse button. To change existing procedure steps or to delete a procedure step, use the mouse cursor to highlight the item to be modified. Then select either the "Change" or the "Delete" button and click the left mouse button. Change the selected step, or add a new step, and press OK to accept the change or verify the deletion of the step.

PREVENTIVE MAINTENANCE DUE

Select Maintenance Due from the MAINTENANCE sub menu or select the PM Due icon.

Enter the start date for preventive maintenance records to be displayed and press Tab to accept. The program will exclude all records for which the maintenance due date is before the start date. Enter the end date. The program will exclude all records for which the maintenance due date is after the end date entered.

The preventive maintenance due table displays all the vehicle items which are due for preventive maintenance during the period specified by the user. The due date for preventive maintenance is calculated by adding the specified maintenance interval to the date of the last preventive maintenance completion. If this is a new asset the due date is calculated from the vehicle in service date. Mainte-

nance items that have a meter reading maintenance interval become due for maintenance when the current mileage reading is greater than the mileage reading at the last preventive maintenance plus the assigned meter interval.

The current mileage reading for the highlighted maintenance item is displayed below the table with a description of the vehicle.

If a work order is open for the item listed the work order number will be displayed. To print a copy of the work order for a particular preventive maintenance record, highlight the record using the mouse. Then depress the "PRINT WO" button, using the left mouse button, to print the work order.

WORK ORDER STATUS

The work order status is a listing of every work order that has been initiated. The pertinent information regarding the work order is provided. In addition to the date of initiation the current status of the work order is indicated as an "O" for a work order with no completion dates and a "C" for work orders that have a completion date.

OPEN WORK ORDERS

The open order listing displays every work order that has been initiated but not yet completed. The pertinent information regarding the work order is provided. In addition to the date of initiation the current preventive maintenance status of the work order is indicated.

SUPPORT

The support menu selection provides access to a series of files that contain data supporting the various maintenance activities. For first time program users these files are normally completed before proceeding with the entry of actual vehicle or maintenance records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the vehicle and maintenance sections of the program.

INVENTORY

The "Inventory" menu selection consists of the Item Master File, which contains detailed information regarding every maintenance part used, and the Inventory file, which indicates the current status of each part. This includes the vendor, last material transaction, and the current on hand balance. Whenever a part is allocated for use in a maintenance work order the inventory level is adjusted accordingly. Whenever the on hand inventory falls below the minimum stocking level specified in the Item Master file the part is automatically added to the Purchase Order list for action by the user.

SUPPORT DATA

The support menu selection provides access to a series of files that contain data supporting the various inventory windows. For first time program users these files are normally completed before proceeding with the entry of actual inventory records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the inventory and purchasing sections of the program.

ITEM MASTER FILE

The item master file defines the characteristics of the individual parts. To access the item master file select "INVENTORY" from the main menu, then select "Item Master File".

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Part No:" above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

The item master file window is a scrolling table listing of all the parts that are used in the maintenance system. The data may be presented in the sorted order by Stock Number, Part Number, Description, or

Vendor as indicated by the tabs. Point to the tab and press the left mouse button for the desired sort order.

The pertinent data about each part is shown in the table. The cost, unit of measure, min and max stocking levels are indicated. Use the right scroll button to expose the quantity of the part that is currently on order. Additional detail about each part is available by selecting the "Change" button.

To add new parts to the item master file select the "Add Part" button using the mouse. To change existing data concerning the part position the highlighted selector bar on the desired part and select the "Change" button. To delete the entire part record select the "Delete" button.

INVENTORY

The inventory of parts on hand is accessed by selecting INVENTORY from the main menu, and then selecting "INVENTORY" from the sub menu.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Part No." above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

The current inventory status is presented as a scrolling table of all the parts in the item master file with the current inventory balance and latest transactions indicated. Use the right scrolling button to view the current inventory balance.

The data is presented in sorted order by either Stock Number, Part Number, Part Description, or Vendor as indicated on the tabs above the table. Point to the desired sort order tab with the mouse and press the left mouse button.

The "Last Transaction" section of the table indicates the date of the last transaction and the quantity that was either issued or received on that date. A part is issued when it is entered as used on a maintenance work order. A part is received when the part is entered as being received against an outstanding order in the purchasing system.

The inventory balance (the amount of parts physically on hand) may be adjusted as required. This may be the result of cycle counting of the inventory or by a complete physical count of all the inventory. If there is a variance of actual count to the computer inventory balance point to the "Adjust Inventory" button with the mouse and press the left mouse button. Change the inventory balance quantity to the correct balance and select OK.

PURCHASING

The "PURCH" menu selection enables the user to generate new purchase orders, view the status of open purchase orders, retrieve purchase order history, receive delivered parts and adjust the inventory automatically.

SUPPORT DATA

The support menu selection provides access to a series of files that contain data supporting the various purchasing windows. For first time program users these files are normally completed before proceeding with the entry of actual purchasing records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the inventory and purchasing sections of the program.

To access a support file to add, view or revise the data, position the highlighted selector bar on the desired file using the mouse pointer. Press the left mouse button to display the selected data.

PURCHASE ORDERS

The FLEET 2000 program is designed to determine when parts used in the maintenance function depletes the inventory below the minimum stock level established in the item master file. When parts are "issued" (by

adding parts to the material used on a maintenance work order) the on hand inventory is reduced accordingly. When this occurs the part is added to the table of "requested purchase orders" using the order quantity specified in the item master file. The user can scan this table periodically and select the items for which purchase orders are to be issued.

Select "PO's" from the purchasing main menu to view the table of all issued purchase orders.

To view only open purchase orders, select "OPEN PURCHASE ORDERS" from the menu.

REQUESTED PURCHASE ORDERS

Select "REQUESTED PURCHASE ORDERS" to view those parts which have fallen below the minimum stock level defined in the inventory system. Items will automatically be added to the list when parts are specified for use in a calibration or maintenance action (issued) and the stock level has been depleted below the minimum level.

To automatically generate purchase orders for the listed items point to each item that is to be included and press the left mouse button. Each item selected for purchase order generation will remain highlighted. To deselect an item, point to the item and press the left mouse button once. The item will not be highlighted. When all the selections have been made point to the "Print Marked PO's" button and press the left mouse button. Individual purchase orders will be printed for each vendor of the required parts. All parts from the same vendor will be combined on a single purchase order.

RECEIVE MATERIALS

To accurately track the purchase order system it is required to document the receipt of parts against the purchase order that was issued to a vendor for that part. When parts are received select the "RECEIVE MATERIAL" menu item from the Purchasing main menu.

The stock number of the part, the dates of issue and receipt, and the required quantity with the quantity received is shown. The date may be viewed in order of stock number, purchase order number, vendor, or date issued by selecting the appropriate tab.

This table listing are all of the current open orders. That is, those purchase orders for which there are one or more items that the quantity of the item received is less than the quantity of the item ordered.

The table displays the open purchase orders, the part number of the part, the quantity of the part ordered, the last received quantity and the total received quantity.

Select the purchase order of the received part by using the mouse to position the highlighted selector bar on the correct purchase order. The user may sort the data by Purchase order, Stock Number, Part Number, or by Vendor to aid in the selection process. Point to the desired sort tab using the mouse and press the left mouse button. When the correct purchase order is selected point to the "Receive Mat'l" button with the mouse and press the left mouse button. Enter the receive date and the quantity received to update the status.

OPEN PURCHASE ORDERS

A scrolling table listing of all open purchase orders is accessed by selecting PURCHASING from the main menu of MPRO 2000, then select PURCHASE ORDERS, then select OPEN PURCHASE ORDERS from the sub menu.

A purchase order is considered open if the quantity of parts received against the purchase order is less than the required quantity on the purchase order.

The listing of all open purchase orders is presented in sorted order by either Stock Number, Purchase Order Number, Part Description, or Vendor as indicated on the tabs above the table. Point to the desired sort order tab with the mouse and press the left mouse button.

The pertinent data about the purchase order is shown in the table. Additional detail about each purchase order is available by selecting the "Change" button.

To add a new purchase order point to the "Add PO" button with the mouse and press the left mouse button. To modify or delete an existing purchase order position the highlighted selector bar on the desired purchase order with the mouse and then select either the "Change" or "Delete" button with the mouse.

To print the selected purchase order point to the “Print PO” button and press the left mouse button.

MAINTENANCE REPORTS

The maintenance reports section provides an extensive choice of maintenance data reports, reports of vehicle maintenance that are due for the user selected time period, reports of the maintenance interval for the vehicle, maintenance overdue reports and a maintenance history report for any user selected vehicle. Take the opportunity to explore the various report formats to fully understand the functions. The unique Management Analysis reports are of particular interest.

A powerful preview feature of the report on screen is provided for each report type. This allows you see the format of the report and the data selected for the report, before it is actually printed. The user, therefore, can review the data and make any necessary changes to the time period or choice of other variables before printing.

The management analysis reports provide the user with labor summary, maintenance cost data, maintenance manpower requirements, and maintenance department performance reports.

To access the report menu select “REPORTS” at the main menu of FLEET 2000 and then select “MANAGEMENT ANALYSIS” at the sub menu.

The labor summary report provides all the maintenance labor expenditures over any user specified time period.

The cost summary report provides the labor, materials, and maintenance subcontracting costs incurred during the user specified time period. This report is also available for each department and for each cost center. This is very valuable to charge back departments or individual cost centers for maintenance work performed over any time period.

The manpower requirements report provides the maintenance labor requirements for open work orders in the system for any user specified time period.

The performance report calculates the efficiency of the maintenance department based on completed work orders for the time period specified by the user.

Place the highlighted cursor on the desired report and click with the left mouse button to view the preview window. Select the print icon with the mouse or select “File” and then “Print”.

REQUESTING MAINTENANCE

The maintenance request system permits any employee with access to the program to request that maintenance be performed. The requester completes the information on the request screen to generate a request. The security in the program permits only a supervisor with a security level of 3 or better to convert the request to a maintenance work order. Only the maintenance supervisor can change or delete a maintenance request that has been entered.

To issue a maintenance request select “REQ” from the main menu or select the Maintenance Request icon.

To add a new maintenance request select the “Add Maint Request” button. Complete the request information, including a complete description of the maintenance to be performed. A unique sequential maintenance request number is automatically assigned to the request.

The supervisor can select multiple requests to be converted to maintenance work orders by highlighting the request with the mouse cursor and clicking the left mouse button (deselect by placing the cursor on the request and again click the left mouse button. After all the selections are made select the “ISSUE WO” button. The requests are converted to work orders. To view all maintenance requests select the “All MAINTENANCE REQUESTS” selection in the “REQ” sub menu.

MILEAGE READINGS

The interval between maintenance can be either time based (days, weeks, years) or meter based (running hours, mileage, etc.). For mileage or meter based maintenance it is necessary to periodically enter the readings for the vehicle items involved. When the mileage reading exceeds the reading at the last maintenance, plus the interval, the item will be listed as PM Due. When fuel records are entered the mileage will automatically be updated to the current mileage reading.

To enter the current mileage reading select the "Mileage" icon or select "Enter Current Mileage Readings" from the MAINTENANCE sub menu.

The table lists all vehicle items that have a mileage or meter interval for maintenance. For each item the current reading (last entered reading), the reading at the last maintenance, and the interval between maintenance is shown. If the current reading exceeds the last maintenance reading plus the interval, the maintenance is identified as being Due.

Place the highlighted selector bar on the maintenance item. For this item the pertinent data about the vehicle is displayed below the table. To enter the current meter reading for this highlighted item enter the reading in the "New Meter Reading" data entry field and press "OK".

To rapidly select an vehicle, type the vehicle number in the locate field at the top of the window and press tab. The highlighted selector bar will be placed on that vehicle. Use the arrow keys or the mouse to select the item for that vehicle.

CUSTOMIZE

The customize main menu selection provides the ability to identify user fields in the vehicle and maintenance sections of the program.

The user defined fields are easily identifiable in the vehicle detail window and the maintenance detail window. The label of the user field is entered in the appropriate entry field of the customize window. That label will then appear whenever the vehicle or maintenance detail windows are displayed.

AVAILABLE MANPOWER

The available manpower feature is used to identify the staffing of the maintenance department and the expected hours of availability over a 12 week scheduling period. This data is used in manpower capacity requirements planning to determine the manpower needed to planned maintenance activities. See also Manpower Requirements Planning.

The manpower availability should be updated weekly, or as desired, for accuracy of the planning activity. This is easily accomplished in FLEET 2000. It is only necessary to enter the first period start date, the remaining eleven weeks are automatically calculated for the user. It is then only necessary to indicate changes in scheduled hours for each maintenance employee.

To add or modify the available manpower select "SUPPORT" from the main menu and the "AVAILABLE MANPOWER" from the sub menu.

The upper scrolling table shows each maintenance department employee, his trade classification, and the hours of availability for that employee over a 12 week period starting at the date shown. Below the scrolling table the available hours for the employee highlighted in the table is shown for the entire 12 week period.

To change the calendar period simply enter the date of the first period in the "Starting Date" entry field and press tab. The remaining dates are adjusted automatically.

To add an employee, delete an employee, or to change the available hours for an employee select the appropriate button.

AFTER THE TOUR

After becoming thoroughly familiar with the various menu selections, experiment with the sample data provided by changing and adding records in each of the data areas. When the user is comfortable with the program remove (delete) the sample data and enter data pertaining to the company. Start by entering the known data in the Support files section. Then enter the Vehicle detail data using the Maintenance menu selection. The user should then begin adding new maintenance work orders.

